Buyers explore growing cornucopia of options

Marketing dollars 'shifting dramatically out of traditional media to everything from trade shows to event sponsorship'

By Kathy Martin

Business-to-business advertisers aren't putting all their budgets in one basket these days.

Having historically clustered advertising in specialized business publications, advertisers are starting to split up the pile and move it to—for them—new media and marketing options.

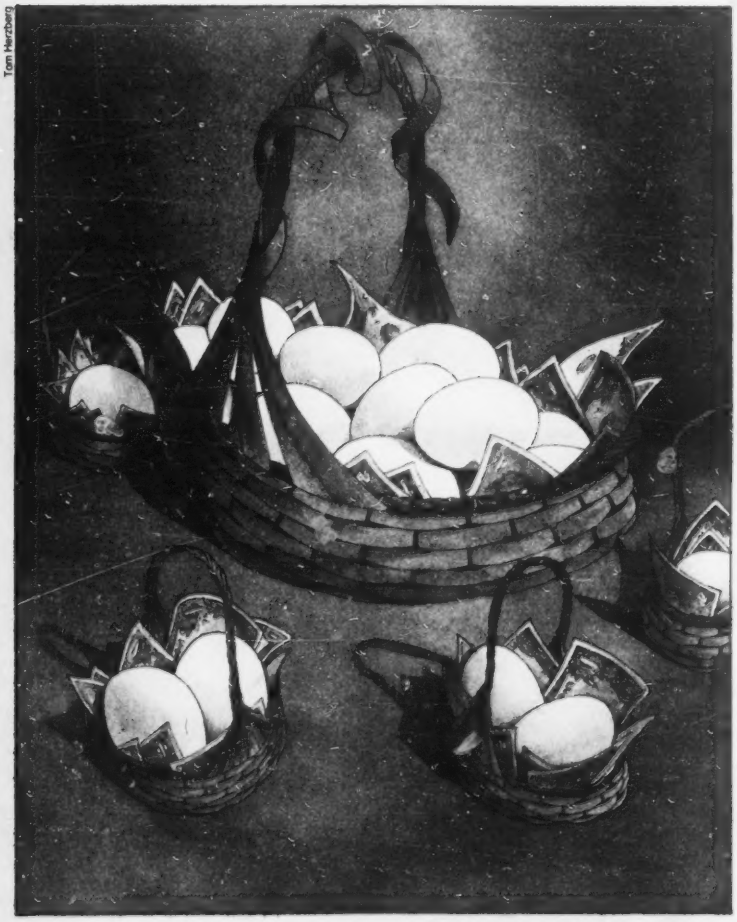
Every medium has its place, and the effective marketer uses all of them, says Kirk Jewett, VP-advertising at Pitney Bowes.

Many media sellers maintain advertisers are scaling back their ad efforts. The Beta Research survey shows that isn't the case.

"Budgets as percentage of sales aren't really declining at all," says Elizabeth McMahon, manager-cor-

(Continued on Page 6)

Tom Herzberg



A letter to our readers

You are reading an historical document.

For the first time *Advertising Age* and *Business Marketing*, both owned by Crain Communications, have joined forces to cover a critical topic: business-to-business media buying and selling.

We feel the subject has been given too little attention for a marketing discipline that accounts for well over $4 billion in advertising revenue.

There have never been more challenges to business media; never more confusion in the relationship between business media buyer and seller; never more uncertainty over the direction of business-to-business budgets.

To get at the root of the shifts in business media and budgets, *Advertising Age* and *Business Marketing* commissioned Beta Research, New York, to conduct a geographically dispersed, random-sample telephone survey of 100 advertisers, 101 agency media directors and 75 media sellers.

The survey found the rules are changing.

Media sellers, insisting business-to-business budgets are declining, will be surprised to find the dollars aren't drying up but shifting to a wider array of business marketing options.

The survey also found the tenuous relationship between buyer and seller is in perhaps its most critical phase.

We feel the survey is the most up-to-date, complete look at the critical issues affecting business media buying.

—The Editors

Inside

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Cover illustration by Steve Bjorkman

Power buyers

How the execs who sign the checks make the hard choices

Media buyers expect more for their money, and it shows.

To show how belt-tightening is affecting media planning, *Advertising Age* and *Business Marketing* went to media buyers and asked what effect the current environment is having on their jobs, spending plans and media expectations.

The Power Buyers were selected by contacting the leading business publication in each of 14 categories and asking them to identify their leading advertiser. Alicia Lasek, a frequent contributor to *Advertising Age*, then tracked down the person most responsible for overseeing each advertiser's budget.

Crittendon

Clark

McIntosh

Robert Crittendon, communications director, Beckman Instruments

A continuing slowdown in the laboratory systems industry is prodding Mr. Crittendon to tread carefully with his media plans. "Some books are down 100 pages, and with the dilemma of advertising costs going up and possibly postal rates, I would predict a cautious 1991," he says.

Beckman Instruments is adding corporate image advertising to its media schedule to make up for a lack of new product introductions this year, Mr. Crittendon says.

But one result of the slowdown may be positive in terms of helping deliver a better ad prospect.

"In the past, publications justified their continuing rate increases with boosted circulation. Now it looks like there is a reduced focus on the extraneous audience and increased focus on the core with some of the publications," he says.

Kelly Clark, media supervisor, J. Walter Thompson USA, New York, for client *The Wall Street Journal*

J. Walter Thompson USA is looking to non-traditional media vehicles to target junior-level media buyers, says Mr. Clark.

"Our primary concern is changing attitudes in the younger media planning community. We've evaluated some non-traditional media vehicles . . . like transit advertising and telephone kiosks," he says.

"Certainly there's going to be a significant amount of waste [in consumer vehicles], but if you're reaching a more attentive group of people in an environment where they're going to notice your ad, it's certainly worth considering."

Anne McIntosh, marketing communications supervisor, E.I. du Pont de Nemours & Co., for its textile fibers department

"We don't just run ads. We have a communications program.

"We look to the [business media] to work with a group of products at Du Pont, not just one product. In home furnishings, there are four publications dealing with the textile end of it, and then a handful on the furnishings side. It's rather close.

"We don't just buy on price, but if the price isn't competitive, we're certainly going to look twice."

Such placement strategy doesn't stem from a tight budget, Ms. McIntosh comments.

"It's a question of expanding our market base every year. And the dollars can't all go to the same place they were going the previous year, and [they can't] go to all the new places. It's a question of being really efficient." □

(Continued from Page 3)

porate marketing communications at 3M.

A Beta Research survey commissioned by *Advertising Age* and *Business Marketing* confirms Ms. McMahon's suspicions. The survey shows 40% of clients' 1990 business-to-business budgets will be greater than 1989's budgets; 39% say this year's spending will mirror 1989's. More than 42% of agency media directors say their shop's business-to-business billings will be up, while 40.6% say they'll be the same as last year's.

Ms. McMahon says marketing dollars aren't diminishing, "they're shifting dramatically out of traditional media into everything from trade shows to event sponsorship to new packaging."

Westinghouse Electric Corp. is one of the companies leading the way into print alternatives.

"We made that switch into non-advertising space because we saw more value in the short-term returns for our dollars," says Bob Fayfich, director-corporate internal communications at Westinghouse. Mr. Fayfich says more than 60% of his budget now goes to non-media activities.

"It's not that print media were the least effective. But the correlation between the money spent and the results received was more difficult to draw with print than with direct response and sales support," he says.

Mr. Fayfich ranks marketing effectiveness in terms of how often a media or marketing strategy allows him to meet customers face to face. As such, salesmen and sales support are at the top of his list, followed by direct response because of its specific targeting capabilities.

"Anytime I can get to my customer one on one—that's my top priority," he says.

Mr. Fayfich says media clutter is becoming a factor in a lot of fields and is working against this objective. "[Clutter] is a weakness in the trade press in general," he says.

John Casteel, manager of marketing communications at Dow Corning Corp., says people are turning less to print media. "The industry is getting less of the information they use from reading nowadays—there's television, broadcast, more face-to-face contact," he says. (An Association of Business Publishers survey challenges Mr. Casteel's contention; *see story on Page 8.*)

Non-print marketing tactics have

(Continued on Page 8)

Publishers on a new page

As ad pages sag, events such as trade shows grow popular

By Sarah Polster

What's the difference if you're robbing Peter and paying Paul?" asks John Emery, president of the Association of Business Publishers.

Nothing is wrong with it, say more specialized trade publishers. Anxious to keep ad revenues in their companies rather than see them shift to other media and marketing options, publishing companies are broadening their base of options to meet advertisers' desire to get closer to the customer.

"If we can't sell as many display pages, we don't go home," says Terry McDermott, president of Cahners Publishing Co. "We think of new reasons to participate in the client's mix." In 1985, display ad pages accounted for about 90% of Cahners' revenue. By 1991, he expects it will be 75%.

Publishers agree diversification is imperative.

Bob Burton, president of Capital Cities/ABC's publishing division, says the tight economy is leaving only enough dollars to support the top books in specific niches.

"So while we sell advertising, we're also going to be selling the whole value-added concept, research and trade shows for example," he says.

The trade show/magazine combination has gained publishers' greatest attention.

ABC's trade show involvement has grown from one or two shows in the early '80s to acquiring an exhibition management company in 1986. Since then, it has added four other shows. "It's an area we're very committed to," Mr. Burton says.

At Gralla Publications, President Bob Bouchette earlier this year combined the display ad sell with trade show booth space for two new publications, *Action Sports Retailer* and *Outdoor Retailer*.

The interest in trade show activity is not surprising. More than 9,800 business publication subscribers responding to an ABP survey said specialized business publications were their primary source of information on products or services they purchase or specify. Trade shows came in second, followed by sales staffs, conventions and seminars, direct mail, directories and reference books, and general business publications and newspapers.

"Most publishers can be active in five of the top six sources and can offer packages of clients' most preferred ways," says Mr. Emery.

President Gerry Hobbs redefined BPI Communication's mission to accommodate non-magazine ventures. "We say the business is communicating specialized information. The mode of delivery for that information is not critical to our purpose."

Trade shows are no panacea, however, he says, adding the cost of producing them and companies' restricting travel budgets argues against relying on them as the answer to revenue problems.

"The publications still represent the lion's share of our business, but the greatest growth prospects are in research and information," he says. "People are willing to pay a higher rate for that information." □

(Continued from Page 6)

"added a dynamic to business-to-business marketing," says Ms. McMahon, "and the dollars have to come from somewhere to fund this."

The assumption is they're coming from specialized business print.

John Emery, ABP president, says specialized business publications' 1990 revenues will increase 4% to 5% over the $4.23 billion he estimates was spent in 4,200 trade books last year. However, ad pages will drop about 2%, he predicts.

The long-term view espoused by buyers indicates a still-dominant, though smaller, role for traditional trade media. Increasingly, advertisers appear to be looking for more direct contact with prospects following smaller initial print efforts.

"We can do some advertising to introduce or predispose customers to a certain line, then go in with a targeted one-on-one selling opportunity like direct response or a trade show," Ms. McMahon says. "It's a better way to use our dollars."

Harry Davis, director of communications at E.I. du Pont de Nemours & Co. and chairman of the Association of National Advertisers business-to-business committee, says there's no simple answer where media dollars are being redirected.

"Marketing dynamics are producing all these buzz words: focusing, targeting, segmentation," he says. "I suppose this has led in some degree to redirecting dollars to direct marketing . . . rather than advertising in an umbrella fashion."

Not surprisingly, every group surveyed by Beta Research for *Ad Age* and *Business Marketing* agrees an increase in product sales is the most important indication of business-to-business advertising effectiveness.

But the next most important factors were positive feedback from sales forces and customer direct re-

Sweet expectations

■ *Beta Research asked business-to-business media sellers whether final 1990 ad revenues would be greater than, less than or mirror 1989 figures. Percentage responding accordingly listed below.*

Increase	73.3%
Decrease	9.3%
Remain the same	17.3%

■ *The same question was asked of clients' business-to-business ad budgets . . .*

Increase	40.0%
Decrease	21.0%
Remain the same	39.0%

. . . and of agencies' business-to-business media billings . . .

Increase	42.0%
Decrease	14.9%
Remain the same	43.6%

■ *Those who were expecting a drop in revenues, budgets or billings were then asked whether this was because of an over-all reduction in business-to-business budgets or a shift to other non-business-to-business marketing activities. The following percentage of each group say the drop results from budget reductions.*

Clients	90.5%
Media directors	46.7%
Media sellers	71.4%

Source: Beta Research

Direct-response and specialized books leave the field in the dust

The battle for a greater share of business-to-business media budgets is narrowing into a two-horse race between specialized trade publications and direct-response media.

Of those clients responding to the Beta Research survey for *Advertising Age* and *Business Marketing*, 24% say by yearend specialized trade magazines will be given a greater percentage of their company's 1990 business-to-business budget. Direct-response activities will receive a greater share of the budget at 18% of client companies.

There's bad news for every other medium, however.

Regional business publications will grab a bigger budgetary share at only 3% of client companies surveyed; local newspapers and general business magazines will command more dollars as a percentage of total budget at only 2% of the companies.

Agency media directors in the survey show a bit more variety in moving their dollars around among the various options, primarily to the benefit of regional business publications.

Although specialized business publications will account for a greater percentage of billings at 21.7% of the agencies surveyed, regional business publications place a close second.

Regional business publications will generate a bigger share of billings at 19.8% of agencies surveyed.

Direct-response activities will be a bigger factor at 13.9% of agencies surveyed, while local newspapers will move ahead at 11.9%. □

Specialized trade magazines	24.0%
Direct-response activities	18.0%
Regional business publications	3.0%
General business magazines	2.0%
Local newspapers	2.0%
National newspapers	1.0%
Spot television	1.0%
Spot radio	1.0%
Network television	1.0%
Network radio	1.0%
Cable television	1.0%

Specialized trade magazines	21.7%
Regional business publications	19.8%
Direct-response activities	13.9%
Local newspapers	11.9%
General business magazines	8.9%
Cable television	7.9%
Spot television	6.9%
Spot radio	6.9%
National newspapers	4.0%
Network television	1.0%
Network radio	1.0%

Source: Beta Research

sponse devices. Because results from direct response tend to be more concrete and those from trade shows are offered directly to the sales force, these marketing tools can seem more effective in the short run.

"Because of a trend toward customer focus, we're seeing dollars go to promotional activities with direct impact on the customer instead," says Mr. Casteel.

Others say it's impossible to generalize about budgetary shifts.

"It's not so much that we take money away from one for the other, but all of us respond to different hot buttons," says Mr. Jewett.

Elinor Biggs, director of advertising at New England Telephone, says marketers have to think of new ways to use media.

"In a less competitive time, people did just what they were comfortable doing," she says. "There's so much more competition today, you can't be traditional or laid-back." □

Free-lance writer Kathy Martin is a former media buyer at Leo Burnett Co.

'Biz Week' the narrow favorite

In the race for bragging rights, it's *Business Week* by a nose.

In the Beta Research survey, *Advertising Age* and *Business Marketing* asked client advertisers and media directors which media title they personally felt was the most effective business-to-business property.

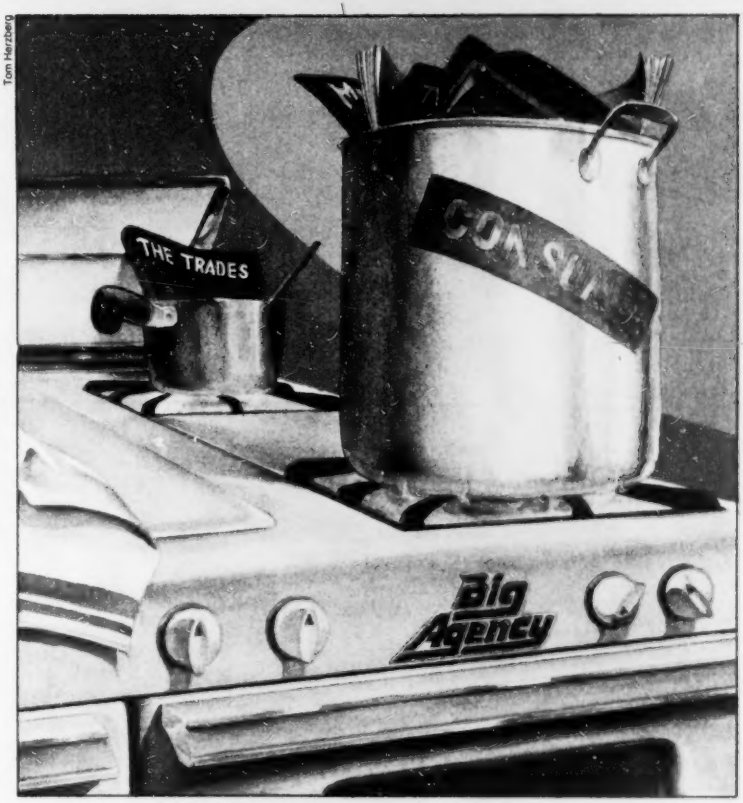
In general business magazines, *Business Week* with 16% of client/advertiser votes edged out *Forbes* and its 15% of votes cast. *Fortune* trailed with 5% of the votes, just ahead of *Industry Week's* 4%. In perhaps the strongest indictment, 45% of advertisers responding to the survey didn't prefer one title over another.

Media directors made it a tighter race: 14.9% selected *Business Week*, 12.9% picked *Forbes* and 11.9% named *Fortune*.

The Wall Street Journal is the clear newspaper favorite of both sets of respondents, grabbing 45% of advertisers' and 46.5% of media directors' votes. *The New York Times* and *USA Today* ran a distant second and third.

Although a whopping 73% of client respondents couldn't name the most effective cable TV network for business-to-business messages, 15% voted for CNN, which also garnered 31.7% of agency media directors.

News/information programming was seen as the most effective radio format, grabbing 20% of client votes and 20% of media director ballots. □



Tom Herzberg

Just the ticket to win over the young media planner

Put on the back burner, media sales reps are forced to try creative ways to get big agency buyers' attention

By Kathy Martin

At first glance, the connection between plumbing fixtures and the San Francisco 49ers may seem convoluted at best.

But for Bill Everham, the link was diagrammed clearly early in his career as a business-to-business space salesman in the late '70s by a young media planner at a large agency.

Mr. Everham, now VP-sales for *Supply House Times*, was pitching for some business from a major plumbing advertiser. The planner first laughed at the ads for toilets in his publication. But then she bluntly said she was much more inclined to hear presentations from space reps who could produce 49ers' tickets.

Mr. Everham insists variations of this scenario are repeated constantly. "This is my experience still —more so than ever," he says.

Although client companies typically are more active in business-to-business media decisions than consumer advertisers, which give their agencies a bigger role in handling media buying, business media sales reps—much to their chagrin—find themselves knocking at the doors of large, consumer advertising-oriented agencies. There, they say, they often find business media buying is put firmly on the agency's back burner.

"The typical young individual just out of college crunching numbers with no appreciation of the subtleties of the marketplace is the one in consumer agencies that handles the business-to-business accounts," Mr. Everham says. "And someone coming up on the consumer side will undoubtedly try to apply consumer principles to trade [buying and planning].

"I get the feeling they hire people and pay them a salary to screen some of us out."

So he may screen out some agencies in response.

"The consumer agencies have just become irrelevant for us in some cases. We tried to play the game by the rules, but now, where it's possible, we bypass the agency and go to the client."

The Beta Research survey commissioned by *Advertising Age* and *Business Marketing* found that while media approval generally comes from a high level—typically a corporate ad director, VP of marketing or agency media director—the media sellers actually are making pitches to all levels of agency personnel—from media planners to account executives to account managers.

An agency's size can have a lot to do with its relationship to business media.

"It all really depends on the size of the agency," says Paul Lightfoot, advertising coordinator for *Telecommunications*. "At Young & Rubicam, we might see a media person straight out of college, while at smaller agencies, we might see the director of marketing."

Mr. Lightfoot says most agency employees he calls on seem knowledgeable about their clients' businesses. But he does sense a certain impatience with trade advertising at some consumer agencies.

"Sometimes I get the sense of being put on the back shelf, put on hold while I have to go through five people," he says. "I think that's because trade magazines are less important to them than consumer magazines."

John Emery, president of the Association of Business Publishers, says agencies simply are buying the revenue-producing products.

"Agencies are being driven by the same forces that drive clients: Quarter-to-quarter earnings per share,"

Power buyer

Mark Edelman, media supervisor, FCB/Leber Katz Partners, New York, for client AT&T Co.

"We're fortunate, our budgets are remaining stable or [are] going up. We've got pretty good indications that things will remain constant and upbeat with the markets tight out there," he says.

"My clients recognize the need to keep re-establishing their name and their image.

"One of the things we go for is getting as much value as we can out of the dollar—maybe business reply cards, focus groups, something to help the sales force gain entry to see their clients.

"With the shrinking dollar, I think the clients and the advertisers have a little bit more clout.

"A lot of magazines are offering buy-one-get-one deals, where you buy one [ad] and pay for color on the second one.

Doug Goodman

Edelman

"Some people look at that as a sign of weakness [among the media]. But if you can afford that, depending on what priority those books fall into in your marketing scheme, that's a great thing to take advantage of and a great way to expand your continuity and your reach." □

he says.

Harry Tropp, associate media director at BBDO, New York, says he doesn't look down on business-to-business media.

"When I do work on business-to-business accounts, I give each salesman as much attention as any other," he says.

But the time allotted and degree of attention relate directly to what the business warrants, he says.

"The average planner has to deal with consumer, business, TV, radio," Mr. Tropp says. "Business-to-business is maybe 5% of our total budget, so it gets about 5% of our time."

The result of business media being put on the back burner is a less informed buyer, Mr. Emery says.

A large number of agencies buy business-to-business media like they buy television, says Michael Kolowich, publisher of *PC Computing*. "They say, 'We'll run the numbers' and treat the readers of magazines as interchangeable targets without understanding the market."

Mr. Kolowich says it's important for an agency to keep a business-to-business specialist on staff to evaluate business-media opportunities.

But belt-tightening agencies have made this one of the first positions to be eliminated. "We've seen the passing of the old-line business publication buyer," Mr. Emery says.

Media directors at larger consumer agencies say the charges leveled against them are unfounded.

There is no business-to-business specialist at Warwick Baker & Fiore in New York, says Exec VP John Meskil, because the account directors prefer to be involved in every aspect of media on their accounts.

He calls media sellers' cry for attention at larger agencies "an easy cop-out for a salesperson.

"If anyone comes to pitch us, they certainly get a hearing," Mr. Meskil says. "But agencies are in the business to serve the client," he says. "We can't deny there are bigger commissions on TV programs, but if that's all we recommended, we wouldn't have any clients."

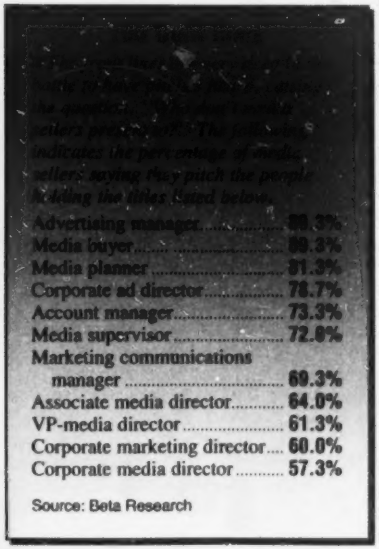
Mr. Kolowich, who was VP-marketing of Lotus Development Corp. before he switched to the publishing side to fill what he calls "an important gap" in the available computer industry media, didn't want to award his account to an agency with too high a mix of consumer business. He says he felt media planners at those agencies wanted to work on consumer accounts rather than trade.

"Frankly, I didn't want my account to be a training ground, lost in a consumer agency," he says.

Mr. Kolowich says he thinks a media buyer must be much more sophisticated to understand business-to-business rather than consumer—"and to truly make it work for the client."

"The irony is that the culture of the typical large agency rewards more—psychologically and financially—to their consumer buyers than their business-to-business buyers. There's probably more ego gratification in buying big network TV schedules, in being entertained and catered to in ways that the mass media know how to entertain," Mr. Kolowich says.

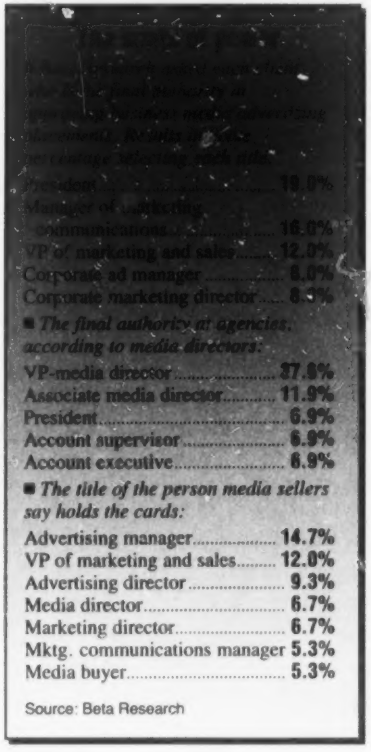
"In business-to-business marketing, you tend to be buying media in $5,000, $10,000 or $20,000 chunks," he says. As long as the buys are that size, 49ers' tickets will continue to help open some agency doors. □



indicates the percentage of media sellers saying they pitch the people holding the titles listed below.

Advertising manager	88.3%
Media buyer	88.3%
Media planner	81.3%
Corporate ad director	78.7%
Account manager	73.3%
Media supervisor	72.0%
Marketing communications manager	69.3%
Associate media director	64.0%
VP-media director	61.3%
Corporate marketing director	60.0%
Corporate media director	57.3%

Source: Beta Research



President	18.0%
Marketing communications	16.0%
VP of marketing and sales	12.0%
Corporate ad manager	8.0%
Corporate marketing director	8.0%

■ *The final authority at agencies, according to media directors:*

VP-media director	37.8%
Associate media director	11.9%
President	6.9%
Account supervisor	6.9%
Account executive	6.9%

■ *The title of the person media sellers say holds the cards:*

Advertising manager	14.7%
VP of marketing and sales	12.0%
Advertising director	9.3%
Media director	6.7%
Marketing director	6.7%
Mktg. communications manager	5.3%
Media buyer	5.3%

Source: Beta Research

Sales triangle or 3-headed monster?

No end to complaints about 'high turnover,' 'fewer sales calls' and 'uneducated' staff

By Kathy Martin

There's no shortage of finger pointing in the business-to-business media marketplace.

Media planners say sellers aren't educated about their client's marketing goals. Sellers retort that buyers aren't knowledgeable about trade media.

Factor in high turnover rates on both the media department and trade rep sides and a frustrating relationship emerges between business-to-business media sellers and buyers, who often must re-educate each other annually about clients' goals and media resources.

High-level contacts between publishers and agency management may stay constant, but it's not uncommon for media buyers and sellers to meet a new face across the desk each planning season.

With tight advertising and continuing profitability pressures, some agency buyers say the reps are a shadow of their former selves.

"Salespeople are not as influential because they're not making as many calls as they used to," says William Mackay, director of media and planning at Rumrill-Hoyt, Rochester, N.Y.

"I understand that economics and smaller staffs dictate fewer visits. Still, it's more difficult to do business with publications when I have to rely heavily on my past experience with people and the materials they send," he says.

"We are less informed about the intricacies of the markets—and it's the job of the salesperson to interpret the market for the account," Mr. Mackay says.

In the long run, cutting staff and trimming travel budgets makes the buying and planning process more difficult and labor intensive for all involved, says Mike Walsh, senior VP, media director at Ketchum Advertising, New York.

"If we only see someone once a year, they don't know the client's business as well as they should," he says. Not only will buyers see a rep only once a year, he says, but a rep typically stays with a publication for only one or two planning cycles.

The disparity between agency and client views of media sellers and their self-image is predictable.

The Beta Research survey commissioned by *Advertising Age* and *Business Marketing* reveals 90% of media sellers believe their recommendations are very influential or somewhat influential in the media buy. Only 63% of agency media directors and 54% of client respondents agree. And 12% of media

(Continued on Page 18)

Clients 10.0%
Media directors 24.8%
Media sellers 37.8%

■ *How influential are media salespeople in determining buying decisions? Percentages reflect those saying very or somewhat influential.*

Clients	54.0%
Media directors	63.4%
Media sellers	90.7%

Source: Beta Research

"I understand that economics and smaller staffs dictate fewer visits. Still, it's more difficult to do business with publications when I have to rely heavily on past experience with people."

William Mackay, Rumrill-Hoyt

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(Continued from Page 14)
directors and 20% of clients say the business-to-business media salesman has no influence on the media decision

Most media directors agree, however, that experienced business-to-business sellers have the *potential* to be more influential than their consumer media counterparts. An informed salesman can provide insight beyond the few numbers available and show how a media property can fit into a marketing plan.

"The more successful salespeople do their homework on the client," says Joe Ostrow, corporate director of media at Foote, Cone & Belding, New York, adding that too many focus on their specific property and not on the industry category.

"If they spent more time thinking of strategies rather than statistics, they might be more important," he says. "They should use numbers as one part of it; use understanding of strategy as another part of it."

According to the survey, media directors and clients say this combination is rare.

Only 25% of media directors and 16% of clients surveyed believe media sellers are very aware of the client's specific marketing needs. While the majority—almost 60%—of these two groups say sellers are *somewhat* aware of client marketing needs, a sizable portion—17% of media directors and 22% of clients surveyed—claim reps are not aware of client company marketing needs and category position. Reflecting a surprising degree of candor, even 12% of media sellers say this about themselves.

"If [salesmen] spent more time thinking of strategies rather than statistics, they might be more important. They should use numbers as [just] one part of it."

Joe Ostrow,
Foote, Cone & Belding

"Some reps do come across as not knowledgeable about the industry or the client," says Bill Besch, associate publisher, *Tour & Travel News*.

He also says blaming shrinking sales staffs is a bogus excuse. "There's no excuse for not knowing the client's business.

"Education doesn't have to do with the load on a salesperson. It has to do with the salesperson having the insight and doing homework before he or she goes in to see the agency. It's a problem within management of the publication, or the quality of the salesperson," Mr. Besch says.

The need for an educated salesperson intensifies when calling on large and medium agencies that deal with a variety of accounts, he says.

"[They] don't have the opportunity to learn everything about so many industries," Mr. Besch says. "With the expertise you bring [to them], some agencies are very open to learning a lot about the industry from you."

The idea of educating agencies doesn't thrill many media sellers, particularly when they feel the client is the key to the buy.

According to the *Ad Age/Business Marketing* survey, 48% of media sellers say the job title of the person who eventually signs off on ad placements is corporate ad director, ad manager, marketing communications manager, marketing director or VP-marketing and sales.

"There's an old saying in business-to-business: Sell the account [client], and tell the agency," says John Emery, president, Association of Business Publishers.

"At consumer agencies, sometimes there are wide gaps in market knowledge," says Stephen Donahue, national sales manager for *ENR*. "We want to go in and say, 'Here's what we do, how we reach them.' But sometimes we have to start a fair distance away from where we want to end up. When someone is already well-versed, we can talk about the client's product right away."

Sellers also say they may have to spend part of the sales call educating buyers on the difference between consumer and business media.

"Education doesn't have to do with the load on a salesperson. It has to do with the salesperson having the insight and doing homework before he or she goes in to see the agency."

Bill Besch,
Tour & Travel News

Cari Kelly, director of advertising at *Meetings & Conventions*, says she always plans to focus on the travel market and hospitality industry when she visits large consumer agencies, but often has to explain to planners that costs-per-thousand and huge circulation figures are not the key criteria.

In the *Ad Age/Business Marketing* survey, 42.6% of agency media directors say CPMs are a very important factor in evaluating a business-to-business publication. Only 20% of media sellers agree.

"People are more used to working on consumer accounts and evaluating everything on CPM rather than buying power and decision-making responsibility of the reader," Ms. Kelly says.

Mr. Walsh believes his agency has nurtured a healthy relationship with the trade media because he looks at the salesman as a key part of a triangle between the client, agency and media.

"When all three work together, the product really moves," he says. "To exclude reps from that doesn't do justice to what they can bring to the party." □

Power buyer

Dee Creighton, director of business-to-business media, Mintz & Hoke, Avon, Conn., for client United Technologies

"I'd expect rates next year to increase anywhere between 9.5% and 10%, based on the postal rate increase.

"We're requesting that publications work with us on merchandising, asking them, 'Could you hold the rates for six months; could you hold them for a year?' And a lot of publications are doing that without even being asked. They're trying to help as much as they can, and it's also very necessary to keep them all going.

Creighton

"A big part of my planning this year is not only finding the appropriate magazines, but working for everyone to get as much as they can. Ten years ago nobody paid attention to these things. They would get the ads, and they'd get a placement, but they never thought about doing anything else for the client.

"I think media people are getting out of the shops and out to the clients, doing a lot more than they did in the past." □

Power buyers

Judy Murphy, media director, Alexandre Marketing Services, Grand Rapids, Mich., for client Dow Chemical

Murphy

"The competition [among media] is getting keener and keener, and you see a lot of head-to-head going on. If you are running in a . . . competitor to another book, that other publication is going to make a lot of overtures . . . more strongly than they did two or three years ago," she says.

"In circumstances where the book has gotten the largest share of our budget dollar we have a little more negotiating power."

Stan Kalisher, director of marketing services, Northgate Computer

Kalisher

"We have spread out [our budget into more vertical publications]. And the publications are more understanding—we can work combined rates and those kinds of things, which can really help a lot for the large advertiser.

"I'm still probably the biggest gorilla on the block, but it looks like I'm spending a lot more than I really do [because of these deals]."

Laurin Leih, VP, director of media services, Kerker & Associates, Minneapolis, for client 3M

Leih

"In every market I deal in, there is ongoing negotiating of rates in addition to merchandising.

"If the client gives you $1 million when you negotiate a package, and you are able to get 20% off that, he's not going to say 'spend the $800,000 and give me the $200,000 back.' What he's going to say is 'keep the $200,000 and get me more impact in the marketplace.' " □

Tom Herzberg

Rate negotiation—no longer a dirty word

Now that buyers 'expect' a deal, there's no stopping them

By Alicia Lasek

Rising ad rates, saturated markets and a soft economy are turning business-to-business media negotiations into a feeding frenzy for buyers—with the media acting as host.

A Beta Research survey commissioned by *Advertising Age* and *Business Marketing* clearly indicates ad rate negotiation—virtually nonexistent a few years ago—is now standard operating procedure.

More than 66% of media sellers say the practice is becoming more frequent—only 8% say it's dropping off—while 57.4% of media directors and 55% of advertisers say rate negotiation is on the upswing.

Most respondents in each group say the average discount is between 10% and 20% off published rates.

The increase in rate negotiation simply reflects the state of business marketing. Although 73.3% of media sellers surveyed say 1990 ad revenues will be greater than 1989 totals, dollars are up thanks to rate increases and not page volume.

With 60% of clients reporting 1990 business-to-business budgets won't exceed '89 spending, buyers are predicting modest ad rate increases for 1991. Even if published increases are high, they say negotiation will bring them down.

"There's a lot of talk about substantial [rate] increases next year. But what the publishers really get is another story," says Frank Mas-

saro, media director at Brouillard Communications.

Robert Coen, senior VP-director of forecasting at McCann-Erickson, New York, says some trade publications will brave 1991 with little extra padding against postal rate increases and strong competition.

Next year's business-to-business rates may climb only 4.5% to 5.5%, and even less in crowded media categories, he predicts.

Buyers and publishers agree rate breaking is hitting the hardest in highly competitive, financially stagnant markets such as food, retail, computer and financial.

Once a publisher breaks rates, buyers say, competitors follow.

A spotty outbreak of rate cutting in 1989 resulted in a 1990 rate-slashing epidemic in the foodservice category, says Mike Charlton, associate publisher of *Nation's Restaurant News*.

"Everyone's asking if this is your best price," he says. "[Some buyers] are flat-out saying, 'I've got X number of dollars and I want to run four pages.' "

Many publishers still bravely insist they won't tamper with published rates. Because advertisers expect some negotiation, however, they often introduce value-added merchandising as an enticement to purchasing ad space.

In the Beta Research study, 82.7% of media sellers, 81.2% of agency media directors and 61% of advertisers surveyed say value-added marketing support programs are a very important or somewhat important factor in influencing business media placements.

Dee Creighton, director of business-to-business media at Mintz & Hoke, Avon, Conn., says this year some books are bringing the value-added concept a little closer to rate negotiation by offering free ad placements if buyers commit to advertise in a specified number of issues.

Publishers are still working to keep clients that primarily focus on consumer advertising—"the Heinzes, the Tyson Chickens, Pepsi-Cola and Coca-Cola"—on the rate card, Mr. Charlton says. "If [these advertisers] had an idea of what some publishers are offering to six, seven and eight-time advertisers. . . ."

The on-the-card, off-the-card debate is straining relationships

(Continued on Page 24)

■ *Percentage of respondents saying average discount off published rates is 10% to 20%.*

Clients	55.0%
Media directors	45.5%
Media sellers	48.0%

■ *Percentage of respondents saying cost per thousand is a very important factor in evaluating business media.*

Clients	34.0%
Media directors	42.6%
Media sellers	20.0%

Source: Beta Research

Audit Bureau of Circulations

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SELL *THROUGH* CPAs

SELL *TO* CPAs

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Audits and Surveys research revealed that...

...85,6% of Journal *CPA-firm* subscribers are decision-makers (partners, principals, etc.)

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SELL *THROUGH* CPAs

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Reader Service #11

Controlling one's circulation destiny

What's better, paid or controlled? As one exec asks: 'Can you have a horse of two colors?'

By Sarah Polster

Daniel Orum, *MacWorld* VP-circulation and marketing, had a problem two years ago.

The paid-circulation magazine had 268,639 readers, but too few were big-time advertising prospects. So *MacWorld* added a controlled circulation audience of 15,000 subscribers who had overseen the purchase of 10 or more Macintosh computers.

Adding controlled subscribers created a few problems—the primary one being the task of teaching media planners and advertisers the value of delivering more prospective buyers, regardless of how they receive the magazine, Mr. Orum says.

Confronting that issue is worth the aggravation, he says. *MacWorld's* ad revenues jumped 29% from 1988 to 1989, and the publication's circulation has climbed to 340,641, of which 50,000 now are controlled subscribers.

MacWorld is not alone in this strategy. "The biggest ballyhoo right now is the question of controlled [circulation publications] trying to add paid [readership] and vice versa," says Virginia Cooper, media director at TFB/BBDO Business Communications, San Francisco.

Agency media directors and clients responding to the Beta Research survey commissioned by *Advertising Age* and *Business Marketing* clearly indicate audience is important: 85.1% of media directors and 84% of advertisers say audience is a "very important" criterion in evaluating business-to-business media.

But opinions are mixed on whether that audience should be paid or controlled circulation. Among media directors, 49.5% prefer paid, while 42.6% favor controlled. Clients are almost equally split with 42% preferring paid audiences and 48% leaning toward controlled.

"It's a real piece of work," Ms. Cooper says. "Can you have a horse of two colors in the same book?

"The paid books in the industry need to reach the decision-makers who aren't used to paying [for subscriptions] and aren't willing to," Ms. Cooper says. "And they're finding it more expensive to keep their paid [circulation] up.

"But then the books like *Data Communications* and *Electronic News* are trying to go paid," she says.

"I'm much more comfortable with controlled adding paid," says Ms. Cooper. "If a controlled book's edi-

Rates

(Continued from Page 23)

among competitive media.

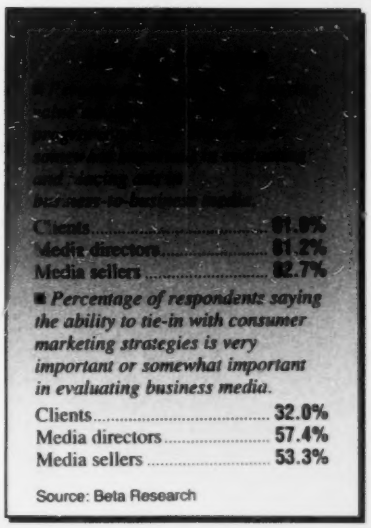
For example, a recent *Forbes* ad claimed *Fortune* was sending "letters to prospects and clients accusing *Forbes* of making special deals not included in our rate card for certain advertisers."

Headlined, "Why is *Fortune* fibbing?" ad copy said *Forbes'* "rate card is our bible, and we never make special deals for any advertiser."

Some say business media simply are catching up with their consumer counterparts.

"We're looking for a fair deal where everybody goes away happy," Mr. Massaro says—particularly the buyer. □

Alicia Lasek is a frequent contributor to Advertising Age.


Clients 61.8%
Media directors 61.2%
Media sellers 82.7%
■ Percentage of respondents saying the ability to tie-in with consumer marketing strategies is very important or somewhat important in evaluating business media.
Clients 32.0%
Media directors 57.4%
Media sellers 53.3%
Source: Beta Research

Power buyers

Steve Karakas, director of advertising, KVO Advertising & PR, Beaverton, Ore., for client Mentor Graphics

Karakas

"We see a lot of merchandising and we take advantage of it. It takes the form of focus groups, research, direct marketing lists.

"The books are pretty competitive so they're more willing to let you know what's available," Mr. Karakas says.

"It used to be that you couldn't get a list or research unless you were running quite a few pages. Now it's just part of the standard operating procedure."

Lisa Strassman, VP-associate media director, McCann-Erickson, Los Angeles, for client Hilton Hotels Corp.

Strassman

"If we purchase a magazine, we will negotiate with the publisher that not only will we buy a page, but that [the publication] will do an extensive merchandising program to the resort general managers. It's to reinforce [the idea among resort operators] that 'I spent my money in the right place, and I feel good about it. I bought this book and they care about me.' We don't just plop the money down and get an ad." □

torial is becoming so important that people are paying for it, it's very valuable so I will pay a higher CPM if they're adding paid. But I'm very leery of paid books adding controlled because I can probably get that controlled somewhere else."

Paid publications typically are assumed to have more reader interest, says Peggy Nordeen, president of Starmark Inc., Chicago.

But better editorial in controlled circulation publications and the fact that most companies cover the subscription cost of work-related titles mute paid circulation publications' claims of having a more interested and a more involved reader, she says.

"[It's] not a function of gross numbers anymore," says Mary Lisi, account manager at CPM, a Chicago-based media-buying service. "It's a matter of how qualified is that circulation to start with."

As ad costs are tied more closely to circulation than ever, Ms. Cooper says it's necessary to keep five to 10 years worth of audit statements for both types of audiences to track the vitality of the audience.

Some media directors say the paid vs. controlled issue is overblown.

"It doesn't matter as long as it's covering our specific target audience and can demonstrate that it's being read," says Chris Czeskleba, media director at Bader Rutter & Associates, Brookfield, Wis.

Paid books still win out for broader, consumer-oriented campaigns, and in some buyers' minds indicate genuine reader interest.

"In the general business magazine area, there's a definite advantage to being paid. It shows a true desire on the part of the reader," says J. Kosanke, senior VP-group media director Lintas:New York.

But in vertical markets with a top paid vs. a top controlled—a rare scenario—several buyers say they would buy both publications. Most buyers say they'll simply put their clients' ads in the best editorial environment.

"The *Journal of Commerce*, a paid publication for the shipping field, has been around for a hundred years," says Bob Storch, media director, Poppe Tyson, New York. Its major competitors are controlled circulation publications that define their reader immediately, something the *Journal of Commerce* can't do, he says.

However, "You know the *Journal of Commerce* has been around, everybody pays a lot of money to get it," Mr. Storch says.

The readers may not be qualified, he says, but "you want to buy it, because you know it's read." □

Sarah Polster is a frequent contributor to Advertising Age.

■ *Percentage of respondents saying they prefer qualified controlled circulation.*

Clients	48.0%
Media directors	42.8%

■ *Percentage of respondents saying they prefer paid circulation.*

Clients	42.0%
Media directors	49.5%

■ *How important is audience composition in evaluating business-to-business media? Percentages reflect those saying very important.*

Clients	84.0%
Media directors	85.1%
Media sellers	82.7%

Source: Beta Research

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An Issue of Influence

JOURNAL

THE LAWYER'S MAGAZINE

Reader Service #12

New ad-editorial bridge goes up

As ad pages slide, some publishers grow cozier

By Alicia Lasek

Specialized trade magazine publishers are proud to trot out the analogy that editorial and advertising are as separate as church and state.

However, advertisers' desire to increase control of editorial projects and publishers' attempts to bring in revenues as ad pages fall off are bridging that chasm.

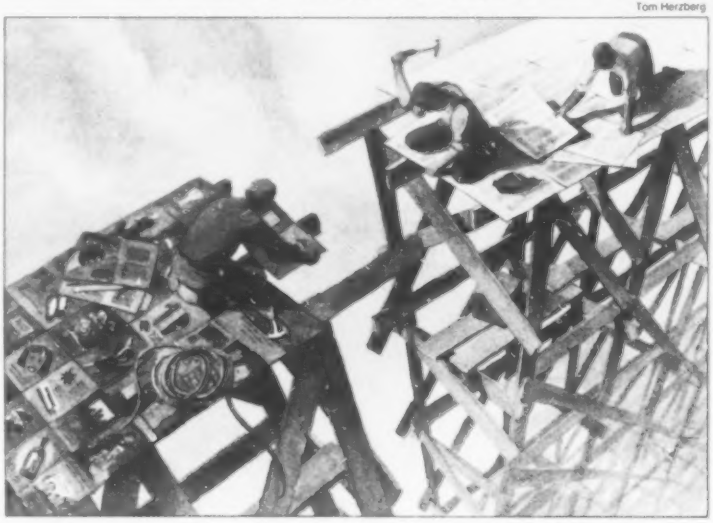
Other advertisers, facing budget cuts that push them out of heavy display space advertising, are turning their attention to providing trade publications with editorial material that touts their products and provides the magazines with low-cost editorial filler.

ICI Films, a raw plastics manufacturer, has cut spending in every department but PR and shifted display dollars to sponsored editorial, says Stephanie Warakomski, communications manager.

The company had been placing three ad campaigns in monthly publications on a nine- or 12-time schedule, but will cut that down to one ad campaign in 1991.

"Our [marketing executives] feel we're getting more value out of our dollar in public relations. We're working with editors on applications articles, bylined articles and technical articles," Ms. Warakomski says.

Tom Herzberg



U.V. Process Supply, a Chicago printing-equipment supplier, originally determined its potential market by sending out 105 press releases each month and noting which publications picked them up.

The company now uses editorial placements to generate sales leads for low-price products that won't support advertising.

"We've evolved into a direct-mail business through this marketing effort," says President Stephen Siegel. "If I'm going to spend $10,000, I'm going to spend it on editorial promotions."

U.V. currently generates about 4,000 leads each year at a cost of "a couple hundred bucks," Mr. Siegel states.

"Most business publications have a 'what's new' section, and they want to keep it filled. It's a mutually beneficial relationship."

Mike Walsh senior VP-media director at Ketchum Advertising, New York, also finds that sponsored editorial enables him to qualify readership.

"But it doesn't have to be a mutual love-fest," he adds. "There's a fine line there. There's a danger of a magazine losing its objectivity and credibility. If the reader isn't interested editorially, they won't be interested in the advertising either."

Many publishers, however, remain protective of editorial's traditionally

Power buyer

Maureen Reichert, VP-media director, Lavey/Wolff/Swift, New York, for client Burroughs Wellcome Co.

Ms. Reichert sees advertisers converting medical journal ad units into inserts to stave off a down market in the pharmaceuticals industry.

"Approximately one-third of the publications' ads are inserts," she says. "Either the publications will have to decrease editorial or increase the cost of inserts.

"Everything is up but ad dollars, and [the journals] are going to try to do everything they can to niche their publication more to certain products as opposed to a broad base," she adds.

Reichert

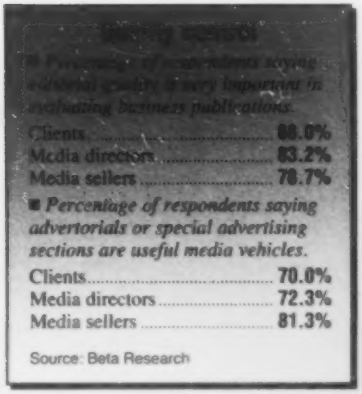
But such targeting strategies limit Ms. Reichert's ad placement.

"We always try to maintain our target audience, and the most cost-effective way to do that is to decrease the depth of our buys. Three years ago you could purchase a large portion of the marketplace. Today, you really have to fine-tune your buys."

In the future, that fine tuning increasingly may take pharmaceutical advertisers out of business media, she says. "Consumer [marketing] is the next forefront of the pharmaceuticals market," she says. □

sacred territory.

"Every advertiser would love [editorial coverage] but no advertiser at *Macworld* gets it," says President-CEO-Publisher Jim Martin. "We have always taken the reader's perspective on product reviews, and we never shape product stories to soothe the needs of the advertising community."


■ Percentage of respondents saying editorial quality is very important in evaluating business publications.
Clients 88.0%
Media directors 83.2%
Media sellers 78.7%
■ Percentage of respondents saying advertorials or special advertising sections are useful media vehicles.
Clients 70.0%
Media directors 72.3%
Media sellers 81.3%
Source: Beta Research

But Mr. Walsh notes that publishers are now more willing to allow marketing in the editorial door.

One way publishers have allowed advertisers to become involved in story generation yet maintain the sanctity of the editorial church is to increase their use of advertorials.

In the Beta Research study commissioned by *Advertising Age* and *Business Marketing*, 81.3% of media sellers, 72.3% of media directors and 70% of advertisers surveyed say they feel advertorials and special advertising sections are useful media vehicles.

ENR snared about $2 million in ad sales from special advertising in 1990 and will run 12 special sections in 1991, compared with three in 1987. "It's creative publishing," says VP-Publisher Howard Mager. "We don't run the general, all-purpose ad section."

Mr. Martin says *Macworld* is pursuing joint advertorials that it will create, write and hopefully run in business publications.

"We're working on a couple [joint advertorials] with Apple Computer. We think business buyers of Macintosh computers might find it interesting if they read about them in *Business Week* or *Fortune*," he says.

Some media buyers remain skeptical about the value of non-display advertising.

"Some are outstanding, but the majority are not well-designed," says Mr. Walsh. "The reader doesn't read them and the advertising doesn't get exposed."

Frank Kopec, director of media services at Rumrill Hoyt, Rochester, N.Y., questions the editorial vitality of a magazine that will run advertorials.

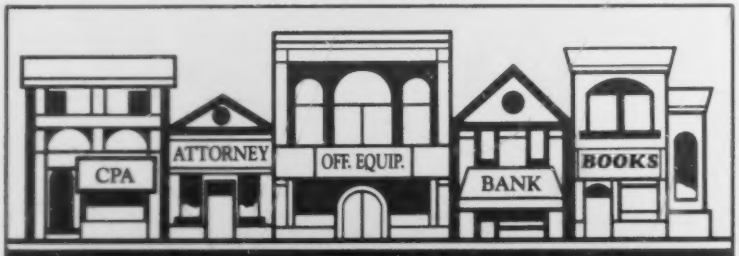
"If [the client is] paying for something, he's paying for the editor to do his job. [By accepting advertorials], an editor is taking advantage of a client's need to get something before the public."

But continued tight times will further fuel advertorial popularity.

"I'd much prefer an editorial section," says Martin Deutsch, president of OAG Travel Magazines. "But there's greater pressure from not only ad agencies but the clients for advertorial sections. It's not only expected, it's demanded."

"If somebody comes to you and says we'll seed a supplement, it's very hard to send them packing," Mr. Martin says. □

Contributing to this story was free-lance writer Kathy Martin.



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Reader Service #14

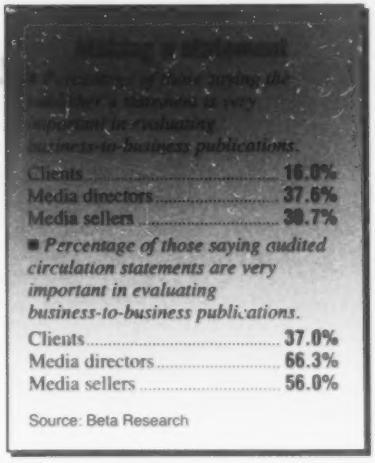
What research?

Tired of the specialized business press 'always' winning, advertisers and buyers scream for unbiased data

By Alicia Lasek

At face value business media research may be helpful, but media buyers say it's often not worth the paper on which it's printed.

More than 66% of the media directors and 37% of the advertisers responding to the Beta Research survey commissioned by *Advertising Age* and *Business Marketing* say audited circulation is a very important guide in judging business-to-business print media. Only 37.6% of media directors and 16% of advertisers say the same thing about publishers' circulation statements.


Clients 16.0%
Media directors 37.6%
Media sellers 30.7%
■ Percentage of those saying audited circulation statements are very important in evaluating business-to-business publications.
Clients 37.0%
Media directors 66.3%
Media sellers 56.0%
Source: Beta Research

Buyers remain skeptical of most data. "You don't seem to see anything [the books] don't win," says Judy Murphy, media director at Alexandre Marketing Services. "We use our own research department as much as possible."

Buyers who base their decisions on what exists today "are probably making the wrong decision because they're basing it on incorrect data," says James Nowakowski, president of consultancy Nowakowski & Associates, which markets an advertising effectiveness measurement service.

Clients' latest demand on media buyers is to get the best possible mix of publications at the lowest possible rates, says Virginia Cooper, VP-media director at TFB/BBDO, San Francisco. "To do that, we need unbiased readership data that goes way beyond circulation."

Ms. Cooper would like to see "more compatible profile studies . . . buying intention studies and accurate analysis of publications' subscribers in certain companies."

Such information is almost nonexistent in those industry categories that aren't covered by research companies such as Simmons Market Research Bureau and Starch/INRA/-Hooper, media buyers complain.

Judi Scrivener, VP-manager of business-to-business media at Noble & Associates, Springfield, Mo., says the accepted universe SMRB provides for her foodservice accounts is invaluable. "In other markets, you can't project frequency because you don't have an established universe."

But even the accepted studies lack the editorial information, psychographic data and response rates the consumer side has had for years, buyers say.

Some agencies increasingly are using in-house resources to find the best buys. KVO Advertising & PR, Beaverton, Ore., has performed its own surveys to pinpoint ideal audiences for high-technology clients.

"We're able to determine which publications best address a prospect on a reach and frequency basis and on an effective cost per thousand," says Steve Karakas, ad director. "We even have psychographic information."

The agency's data base has helped it plan placements more effectively, he says, justifying a cutback in the number of books bought and suggesting an increase in the frequency of placements in fewer books. "We're able to figure out exactly [the value of the] third or fourth book. And the incremental value is not always there."

But many business-to-business agencies don't have the resources to develop in-house research facilities or commission outside surveys. They say business media should bear the burden of providing reliable information, and those who do will reap the rewards of meeting buyers' needs.

"In the old-line business-to-business markets, [publishers] have not realized that they should come kicking and screaming into at least the 1970s to compete for dollars," says Ms. Cooper. The business-to-business industry complains about the research that's out there, she says, but no one is willing to support long-term commitments to bettering the research. "There doesn't seem to be a drive for excellence."

But new research sources are springing up sporadically. Cahners Publishing Co. has funded a joint project with SMRB to create Affinity Index, a qualitative measure of the reader-to-editorial relationship. The index, which was launched in September and draws from a universe of 10,000 readers, gauges factors including ad readership and ad effectiveness in a publication.

Mr. Nowakowski says buyers share some of the blame for bad data. "It all goes back to the interpreter. There's total confusion in business-to-business because no one knows how to use the research on the table and no one's come out and challenged it," he says. □

Power buyer

Judi Scrivener, VP-manager of business-to-business media, Noble & Associates, Springfield, Mo., for client Tyson Food Service.

"In foodservice in general, spending should stay on track for 1991, but with budgets getting tighter, clients are getting more demanding.

"From a media perspective, we're going to have to develop different ways to prove the effectiveness of the dollars we have spent," she says.

"Our media department is not an island—we're an extension of the marketing plan. So we are looking at the entire marketing program that our clients are putting together and how we can support that from a media standpoint.

"What I'm seeing is more and more of the business-to-business industries are trying to become as sophisticated as the majority of consumer-type industries. They're developing more research information, and not just publication directed." □

CONSUMER MAGAZINE AD LINAGE

	September 1990	September 1989	Year-to-date 1990	Year-to-date 1989
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	137.0	152.6	1,323.9	1,423.7
Automobile Magazine	61.1	50.1	577.7	523.0
Car & Driver C.	126.3	86.9	965.7	950.9
Car Collector & Car Classics	13.8	17.4	135.3	152.8
Car Craft	64.6	72.3	627.2	691.0
Circle Track	70.8	73.2	735.5	778.2
Cycle	33.5	33.7	371.1	402.1
Cycle World	36.0	34.8	408.1	375.8
Dirt Rider	34.2	21.4	371.5	288.0
Dune Buggies & Hot VWs	80.1	67.9	652.0	619.9
Family Motor Coaching	194.3	203.7	1,532.6	1,654.9
4 Wheel & Off-Road	89.0	75.8	743.7	737.5
Four Wheeler C.	81.8	80.7	745.4	748.4
Hot Rod C.	63.1	72.8	613.4	813.4
Motorcyclist	31.3	25.0	383.5	381.0
Motor Trend C.	66.7	63.1	668.7	742.8
Motorhome	95.8	99.4	861.3	866.1
Rider	26.4	25.7	303.1	313.8
Road & Track C.	101.2	91.0	835.6	913.6
Trailer Life	106.1	93.7	837.5	835.3
Total Group	**1,513.2**	**1,441.0**	**13,692.6**	**14,212.3**
% change	**5.0%**		**-3.7%**	
■ Boating & yachting				
Boating	105.8	148.0	1,117.2	1,350.8
Chesapeake Bay	35.0	46.0	384.1	467.3
Cruising World	113.8	95.5	969.6	973.0
Lakeland Boating (11X)	69.0	77.0	706.5	810.8
Motor Boating & Sailing	94.8	118.2	1,069.1	1,303.7
Sail	100.9	105.9	968.9	1,029.6
Trailer Boats (11X)	31.2	37.2	540.3	625.2
Western Boatman	31.7	37.3	227.2	227.1
Yachting C.	152.4	165.3	1,213.8	1,260.6
Total Group	**734.6**	**830.3**	**7,196.7**	**8,048.2**
% change	**-11.5%**		**-10.6%**	
■ Civic/fraternal				
Elk (10X)	15.2	12.1	125.8	118.1
Kiwanis	18.8	19.5	136.9	132.5
Lion (10X)	9.3	11.5	43.0	46.6
Rotarian	20.0	15.3	141.8	108.6
V.F.W. (11X)	31.6	30.6	227.4	229.3
Total Group	**94.9**	**89.0**	**674.9**	**635.1**
% change	**6.6%**		**6.3%**	
■ General				
American Health (10X) C.	29.6	91.6	327.8	558.6
American Heritage (80) C.	63.7	55.4	262.4	276.4
American Legion	37.2	41.3	311.2	286.4
American West (5X)	—	—	105.5	126.2
Art & Antiques (10X) C.	77.0	80.4	553.2	512.1
ARTnews (10X)	105.6	119.7	826.8	802.5
The Atlantic A. C.	77.5	50.4	475.4	419.7
Bon Appetit A. C.	74.9	74.0	728.5	704.0
Cable Guide C.	30.6	42.1	240.3	318.5
Caribbean Travel & Life (6X)	48.0	42.0	210.1	172.6
Changing Times C.	56.3	60.4	482.7	442.1
Conde Nast Traveler C.	95.7	86.9	732.1	636.3
Connoisseur C.	72.3	107.7	493.3	632.8
Consumers Digest (6X) C.	32.2	25.8	130.7	118.0
Cooking Light C.	57.7	56.8	295.0	256.7
Departures N. America (6X)	55.0	42.2	216.4	151.6
Ebony C.	76.7	89.9	779.1	874.2
European Travel & Life (10X) C.	54.3	82.0	362.3	364.5
Food & Wine C.	57.6	63.2	487.3	520.0
Games (6X) C.	—	11.6	34.1	73.8
Golden Years (6X)	40.6	42.8	173.5	239.5
Gourmet C.	107.6	113.9	860.3	821.2
Harper's Magazine A. C.	36.6	30.0	279.4	265.2
Harrowsmith (6X)	57.7	57.2	254.2	253.4
Islands (6X)	81.7	59.5	324.7	307.2
Let's Live	52.0	54.0	444.0	414.0
Life C.	60.2	45.8	482.3	539.8
Longevity C.	46.2	30.2	324.4	179.3
Mature Outlook (6X) C.	53.6	—	194.2	143.3
Modern Maturity (6X) C.	—	—	148.1	157.1
Money C.	92.7	96.6	876.7	882.6
Mother Earth News (6X) C.	57.7	76.8	301.6	382.2
National Geographic C.	21.4	13.7	195.4	167.2
National Geographic Traveler (6X) C.	40.1	32.9	224.3	149.0
Natural History C.	39.0	37.7	356.9	350.2
New Choices C.	43.2	48.1	257.3	322.2
Prevention C.	51.5	60.1	418.3	464.6
Reader's Digest A. C.	95.4	84.6	776.0	772.4
Saturday Evening Post (9X) C.	41.3	49.9	224.8	267.1
Smithsonian C.	79.8	102.5	678.0	718.7
Spin C.	43.9	34.3	374.1	349.8
Town & Country C.	194.8	191.5	1,070.0	1,086.4
Travel-Holiday C.	29.8	26.8	319.6	323.7
Travel & Leisure C.	135.2	135.5	990.9	1,038.8
Travelhost	1,448.3	1,316.0	11,752.5	11,552.0
Vanity Fair C.	197.4	209.2	961.1	971.5
Yankee C.	76.3	70.8	552.8	535.2
Total Group	**4,325.6**	**4,243.9**	**31,869.5**	**31,900.6**
% change	**1.9%**		**-0.1%**	
■ Home				
Architectural Digest A. C.	111.0	139.8	1,306.5	1,253.4
Better Homes & Gardens C.	102.3	119.5	909.9	1,023.5
Colonial Homes (6X) C.	—	—	188.7	229.8
Columbus Monthly-Homes (4X)	—	—	88.9	96.5
Country Home (6X) C.	—	56.9	228.4	325.7
Country Living C.	92.2	106.3	794.8	814.3
Family Handyman (10X) A. C.	51.0	38.7	293.0	372.4
Florida Home & Garden	49.0	47.4	562.0	564.1
Flower & Garden (6X)	23.8	28.6	178.3	195.0
Home C.	69.4	72.0	484.0	524.7
Home Mechanix C.	75.5	72.2	415.0	447.4
Homeowner (10X) C.	27.0	35.6	192.8	255.3
Horticulture	33.3	31.4	384.8	344.8
House Beautiful C.	66.7	81.6	531.5	584.7
House & Garden C.	100.8	115.6	720.0	655.5
Metropolis	78.8	75.3	437.4	503.8
Metropolitan Home C.	90.2	119.8	814.8	885.0
Midwest Living C.	—	—	277.8	260.8
1,001 Home Ideas C.	66.7	61.3	518.6	513.3
Organic Gardening (9X) C.	53.8	33.6	319.6	336.2
Phoenix Home/Garden	66.7	117.7	636.0	658.8
Practical Homeowner (9X) C.	60.6	54.5	314.8	228.7
San Diego Home/Garden	65.8	80.5	638.3	650.6
Southern Accents (6X) C.	85.5	154.1	524.1	553.1
Southern Living C.	110.6	127.4	931.6	1,003.9
Sunset Magazine A. C.	99.5	113.7	1,084.3	1,125.4
Workbench (6X)	45.8	44.9	188.6	211.1
Total Group	**1,625.9**	**1,928.4**	**13,964.5**	**14,617.7**
% change	**-15.7%**		**-4.5%**	
■ In-flight & other passenger				
Aboard Group (6X)	43.3	41.8	211.6	193.8
Alaska Airlines	81.8	83.2	656.5	574.4
America West Airlines	94.7	84.2	718.7	604.0
American Way (24X) C.	171.6	182.7	1,273.4	1,320.3
Continental Profiles	43.1	53.5	446.5	519.1
Delta Sky C.	77.6	95.5	630.8	674.4
Eastern Review	30.8	31.7	286.9	441.9
Pan Am Clipper	39.5	66.9	398.1	478.5
Southwest Spirit	53.3	61.6	478.1	572.3
Spirit of Aloha	32.0	25.1	308.7	214.7
TWA Ambassador B.	39.2	—	336.0	—
United Vis `A Vis	80.0	97.4	625.0	767.4
US Air Magazine	74.1	83.3	565.5	523.0
Total Group	**821.8**	**906.9**	**6,599.7**	**6,883.9**
% change	**-9.4%**		**-4.1%**	
■ Men's				
Esquire A. C.	131.9	168.8	879.7	893.4
Firehouse Magazine	34.4	34.0	346.8	353.2
Gentlemen's Quarterly A. C.	295.0	343.6	1,403.8	1,581.4
Men's Health (6X)	28.7	—	105.1	—
Muscle & Fitness C.	98.8	116.1	933.8	1,164.1
Penthouse A. C.	60.7	82.8	468.0	466.8
Playboy A. C.	63.5	50.9	505.5	541.2
Salute (10X)	67.3	43.5	356.6	257.0
Total Group	**780.4**	**839.7**	**4,999.3**	**5,257.0**
% change	**-7.1%**		**-4.9%**	
■ Metropolitan				
Aloha (6X)	51.2	62.6	233.7	223.0
Annapolitan	59.3	59.4	578.3	523.8
Atlanta	78.8	78.5	730.0	615.9
Baltimore	48.0	63.6	507.2	588.4
Boston	116.6	170.2	914.8	1,226.1
California C.	75.9	57.5	559.0	513.2
Chicago	95.6	125.3	765.2	944.6
Chicago's North Shore	95.4	107.6	804.9	866.6
Cincinnati	60.2	43.5	361.2	408.2
Cleveland	42.9	61.5	392.4	477.1
Columbus Monthly	77.6	99.7	543.2	633.1
Connecticut	91.0	84.4	750.4	875.7
D/Magazine	47.9	60.0	486.5	605.8
Detroit Monthly	68.9	84.3	489.8	507.2
Grand Rapids	45.0	49.3	308.1	354.8
Gulf Coast (13X)	31.9	18.4	374.6	301.8
Honolulu	56.1	51.4	500.7	475.7
Houston Metropolitan Magazine	66.5	63.5	565.4	532.4
Inside Chicago (8X)	30.0	31.8	140.8	177.8
Los Angeles	121.9	134.5	1,218.7	1,318.8
Louisiana Life (6X)	29.2	28.8	151.7	132.2
Madison	44.0	48.0	366.0	356.0
Memphis	41.7	54.0	514.7	598.0
Mid Atlantic Country	72.6	58.8	439.7	383.5
Milwaukee	57.7	82.3	493.3	482.0
Minneapolis/St. Paul	116.0	118.9	902.0	969.8
Minnesota Monthly Magazine	64.4	75.0	567.8	455.6
New Jersey Monthly	71.2	107.2	603.4	824.7
New Mexico	44.0	38.0	394.3	396.9
Ohio	68.1	73.6	479.5	469.4
Orlando	71.0	106.5	811.3	865.4
Pacific Northwest	47.8	65.4	423.5	432.6
Palm Beach Life	46.8	42.2	516.0	589.1
Palm Springs Life	271.0	255.7	1,131.1	1,121.5
Philadelphia	109.8	131.9	1,118.7	1,195.8
Phoenix	29.6	23.7	319.2	385.0
Pittsburgh	56.8	70.7	573.6	588.0
Rhode Island Monthly	49.3	60.3	520.3	503.7
Sacramento Magazine	55.8	51.5	512.2	488.0
St. Louis	49.0	46.7	449.5	421.7
San Diego	136.1	127.4	1,176.0	1,185.1
San Francisco Focus C.	107.8	107.6	841.8	905.2
Sarasota (10X)	—	—	592.0	600.0
South Florida Magazine	64.7	78.7	539.7	519.2
Texas Monthly C.	123.4	131.1	981.3	948.5
Ultra	139.8	38.5	613.5	348.1
Washington-Dossier	39.9	45.8	335.6	326.0
The Washingtonian	137.0	167.0	1,135.3	1,402.1
Total Group	**3,504.9**	**3,742.0**	**28,727.7**	**30,062.8**
% change	**-6.3%**		**-4.4%**	
■ Music/entertainment				
Audio	85.8	90.4	738.5	801.6
Dance Magazine	50.1	52.2	481.1	479.0
Playbill	55.7	50.9	403.4	426.8
Premiere C.	59.6	57.3	548.3	523.5
Video Magazine	81.2	77.0	595.3	524.4
Total Group	**332.4**	**327.8**	**2,766.5**	**2,755.3**
% change	**1.4%**		**0.4%**	
■ Outdoor & sport				
Alaska	49.4	33.9	365.2	346.6
The American Handgunner (6X)	58.0	67.0	286.0	274.0
American Hunter	45.0	42.3	190.1	190.1
American Rifleman	36.3	37.0	223.2	210.5
Backpacker (7x) C.	—	—	173.6	154.4
Bass Master (10X) A. C.	48.7	62.6	539.2	651.1
Bicycling (9X) C.	—	67.9	796.3	947.3
Cross Country Skier (5X)	—	—	73.6	70.5
Ducks Unlimited (6X)	44.6	37.7	147.7	143.7
Field & Stream C.	87.0	114.8	605.2	711.8
Fishing World (6X)	16.6	18.1	195.7	179.7
Florida Sportsman	81.5	100.1	1,106.0	1,145.8
Golf Digest C.	80.0	98.5	1,006.9	1,046.7
Golf Illustrated C.	42.1	36.5	456.0	411.0
Golf Magazine C.	74.8	74.7	900.9	954.5
Gun Dog (6X)	—	—	133.5	162.0
Guns	52.0	48.0	366.0	343.0
Guns & Ammo	50.5	51.7	406.6	378.3
In-Fisherman (7X)	28.0	25.0	431.5	508.5
Outdoor Life C.	91.6	86.5	605.7	724.3
Outside Magazine	63.6	51.2	556.6	550.2
Petersen's Hunting	74.9	82.5	400.0	402.3
Runner's World (12X) C.	57.8	33.9	348.9	346.0
Salt Water Sportsman C.	62.1	76.1	889.7	1,096.5
Shooting Times	47.2	41.6	288.8	293.6
Sierra (6X)	46.7	53.2	178.6	230.3
Ski (8^) A. C.	161.5	174.1	454.3	510.5
Skiing (7X) A. C.	187.5	170.6	417.5	387.0
Skin Diver C.	126.7	103.5	1,118.6	1,053.2
Southern Outdoors (9X)	51.5	54.1	318.6	386.4
Sport Magazine C.	38.6	32.0	270.1	314.7
Sports Afield C.	81.4	69.4	597.6	574.1
Surfing	84.7	89.3	666.3	848.6
Tennis C.	94.3	107.2	577.6	633.3
Waterski (9X)	47.2	51.6	561.1	607.6
Western Outdoors (9X)	30.1	28.8	252.3	300.0
Wildfowl (6X)	—	—	52.6	56.2
WindRider (8X)	38.6	28.5	467.5	338.1
Wing & Shot (6X)	—	—	54.9	63.5
World Tennis C.	43.4	66.2	331.3	440.8
Total Group	**2,223.8**	**2,315.9**	**17,811.5**	**18,986.6**
% change	**-4.0%**		**-6.2%**	
■ Photography				
American Photo (6X) C.	47.7	33.1	241.5	278.5
Petersen's Photographic	24.5	27.4	218.0	235.1
Popular Photography C.	103.0	102.8	905.9	761.7
Total Group	**175.2**	**163.3**	**1,365.4**	**1,275.2**
% change	**7.3%**		**7.1%**	
■ Science/electronic/mech				
Discover C.	36.4	38.7	301.7	348.9
Home Office Computing C.	41.4	38.6	398.4	386.1
Omni C.	39.1	57.3	428.4	502.4
Popular Mechanics C.	74.1	63.9	592.3	692.1
Popular Science C.	66.7	74.8	558.2	749.3
Scientific American C.	64.8	71.7	367.4	376.0
Spectrum C.	45.5	58.8	454.0	485.9
Total Group	**368.0**	**403.7**	**3,100.5**	**3,540.7**
% change	**-8.9%**		**-12.4%**	
■ Woman/fashion/service				
Bride's Magazine (6X) A. C.	—	—	2,354.9	2,373.9
Cosmopolitan A. C.	233.2	241.6	1,578.0	1,726.5
Elle C.	334.3	343.2	1,590.6	1,596.9
Essence C.	75.0	87.8	650.1	664.7
Family Circle (17X) A. C.	185.5	215.8	1,218.1	1,449.9
Glamour C.	228.6	207.9	1,375.3	1,471.4
Good Housekeeping A. C.	173.5	176.0	1,225.0	1,152.0
Harper's Bazaar C.	225.5	301.9	996.7	1,067.4
Health C.	37.3	37.2	290.5	293.8
Imagen	104.0	80.2	868.9	758.7
Ladies' Home Journal C.	137.2	141.5	1,073.9	1,123.7
Lear's C.	60.6	83.8	459.4	443.3
Mademoiselle C.	205.4	184.3	1,153.9	1,239.2
McCall's C.	89.1	90.2	705.0	815.7
Military Lifestyle (10X)	86.7	66.8	700.9	417.9
Mirabella C.	154.6	149.0	751.7	397.7
Modern Bride (6X) C.	—	—	1,892.4	1,835.8
New Woman C.	87.7	67.5	673.1	752.7
Parents Magazine A. C.	113.4	126.0	1,016.4	1,063.1
Redbook C.	143.1	144.4	853.4	867.8
Savvy C.	42.7	46.6	272.0	394.9
Self C.	158.1	145.9	947.8	974.6
Seventeen C.	115.6	111.3	994.5	1,079.0
Shape C.	52.9	73.7	476.7	581.9
Soap Opera Digest (26X) C.	43.4	41.6	292.2	342.3
Teen Magazine	94.3	65.3	482.7	443.9
True Story A. C.	52.0	67.7	473.4	495.7
Victoria C.	54.9	56.5	387.4	261.3
Vogue C.	476.9	599.0	2,159.1	2,431.6
W Magazine (26X) C.	156.5	204.4	982.6	1,102.1
Weight Watchers C.	43.6	43.4	316.4	306.4
Woman (10X) C.	29.7	31.8	212.0	255.9
Woman's Day (15X) A. C.	85.8	116.3	984.9	1,203.5
Workbasket	26.3	28.5	180.4	190.8
Working Mother C.	75.9	80.8	541.0	618.0
Working Woman C.	144.8	155.2	735.5	816.1
Total Group	**4,327.9**	**4,633.0**	**31,866.7**	**33,010.1**
% change	**-6.6%**		**-3.5%**	
■ Youth				
Boys' Life C.	23.8	19.1	149.5	157.0
Campus Life (10X)	44.2	50.8	276.5	290.6
Total Group	**68.0**	**69.9**	**426.0**	**447.5**
% change	**-2.8%**		**-4.8%**	
■ Business/national				
Barron's	142.3	170.0	1,253.8	1,306.3
Black Enterprise C.	52.1	63.9	699.7	686.3
Business Month C.	47.6	35.8	315.4	279.0
Business Week (52X) A. C.	346.0	370.9	2,845.2	3,098.9
Entrepreneur C.	191.8	152.2	1,505.0	1,3
Financial World (26X) C.	80.4	56.9	751.3	5
Forbes (26X) C.	274.5	301.9	2,485.1	2,3
Fortune (26X) C.	304.5	370.6	2,320.4	2,5
Frequent Flyer	63.0	52.2	363.8	3
Futures	35.9	42.3	361.8	3
Inc. Magazine C.	106.5	96.5	784.2	8
Income Opportunities	87.4	90.3	544.0	5
Industry Week (23X) A.	100.9	114.6	799.7	8
Nation's Bus. (12X) A. C.	26.2	32.5	219.5	3
Success C.	38.9	39.2	249.3	2
Total Group	**1,897.8**	**1,989.8**	**15,498.1**	**15,8**
% change	**-4.6%**		**-2.0%**	
■ Business/regional				
Arizona Business Gazette B.	38.3	—	400.3	
Bus. Jrnl.-Milwaukee	146.7	128.9	1,271.5	1,2
Bus. Jrnl.-Sacramento	72.4	80.2	797.2	7
Bus. North Carolina	41.8	41.3	371.8	3
Capital Dist. Bus. Review (52X)	88.5	80.8	635.7	6
Caribbean Business	109.2	97.5	1,083.3	1,1
Corporate Rpt. Minnesota	58.7	74.9	426.8	4
Crain's Chicago Bus. (52X)	152.2	127.3	1,246.4	1,2
Crain's Cleveland Bus. (52X)	74.4	84.6	664.4	6
Crain's Detroit Bus. (52X)	79.8	84.6	769.9	6
Crain's New York Bus. (52X)	64.0	58.0	577.0	4
Florida Trend (13X)	33.0	39.2	395.0	4
Georgia Trend	51.7	58.7	379.1	4
Grand Rapids Bus. Jrnl.	58.6	40.4	486.5	3
Hawaii Business	55.7	41.0	521.5	4
Houston Bus. Jrnl. (52X)	124.7	92.0	661.4	6
Indianapolis Business Journal (52X)	155.9	171.8	1,370.1	1,4
M Inc. C.	151.7	135.7	620.3	6
Nashville Business & Lifestyle B.	39.1	—	39.1	
New England Bus. (12X) A.	39.0	38.5	283.3	3
New Orleans City Bus.	52.2	42.3	487.5	3
Pacific Bus. News (52X)	109.3	90.8	959.9	9
Philadelphia Business Journal	124.7	141.8	1,038.4	1,2
Pittsburgh Bus. Times (52X)	102.3	96.7	872.7	9
Providence Business News	54.0	75.9	525.1	8
Regardie's/Washington	125.0	160.0	1,166.0	1,4
St. Louis Bus. Jrnl. (52X)	92.3	95.5	921.1	9
Warfield's Monthly Baltimore	74.8	74.8	536.8	5
Total Group	**2,292.5**	**2,253.1**	**19,168.7**	**19,8**
% change	**1.8%**		**-3.5%**	
■ National Sunday mags				
Parade (52X) C.	73.4	55.7	518.3	5
USA Weekend (52X) C.	75.7	54.9	500.1	4
Vista Magazine (52X)	35.5	19.2	186.2	1
Total Group	**184.6**	**129.8**	**1,204.6**	**1,1**
% change	**42.2%**		**6.3%**	
■ Newspaper Sunday magazine				
Boston Globe	191.9	266.2	1,436.9	1,7
Chicago Tribune	171.5	150.8	938.9	9
Cleveland Plain Dealer	87.6	84.4	543.2	5
The Dallas Morning News	74.0	60.0	473.3	5
Detroit Free Press	63.0	34.0	466.0	3
L.A. Times C.	83.7	99.0	671.2	8
Louisville Courier-Jrnl.	46.0	40.0	236.0	2
New York Times Mag. C.	439.9	416.1	2,678.8	2,7
Philadelphia Inquirer	141.9	88.0	832.0	7
Seattle Times	105.0	76.0	720.0	5
St. Louis Post Dispatch	121.8	78.2	706.8	6
Toledo Blade Magazine	33.2	36.5	313.7	2
Washington Post	159.9	145.3	962.8	1,1
Total Group	**1,719.4**	**1,574.5**	**10,979.6**	**11,6**
% change	**9.2%**		**-5.9%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	188.3	123.6	1,365.5	1,3
Army Times Military Group:				
Air Force Times (52X)	238.7	168.7	1,396.8	1,4
Army Times (52X)	230.0	156.3	1,384.9	1,3
Navy Times (52X)	250.1	178.1	1,474.0	1,5
Capper's (26X)	29.4	35.4	258.3	2
Commonweal (22X)	13.5	7.2	79.5	
Golf World (40X)	60.8	105.3	1,163.4	1,0
Grit (52X) A.	46.4	41.0	335.8	3
National Journal (50X) C.	67.0	74.0	491.8	5
National Review (25X)	26.6	34.2	236.7	2
New Republic (48X)	45.1	39.4	331.0	3
New York Mag. (50X) C.	228.0	281.8	1,774.6	2,0
New Yorker C.	203.9	243.2	1,472.8	1,4
Newsweek (52X) A. C.	216.2	185.1	1,542.7	1,6
People (51X) C.	343.2	346.9	2,494.6	2,6
Rolling Stone (25X) C.	190.4	172.6	1,351.6	1,3
Sporting News (52X) C.	33.4	47.7	368.5	4
Sports Illustrated (52X) A. C.	245.8	243.8	1,806.7	2,0
Time (52X) A. C.	225.1	216.6	1,794.0	1,8
TV Guide (52X) A. C.	446.6	459.0	2,186.8	2,4
US Magazine (26X) C.	56.2	54.8	506.9	5
U.S. News & World Report (50X) A. C.	162.4	137.0	1,324.7	1,3
Total Group	**3,547.1**	**3,351.6**	**25,141.7**	**26,3**
% change	**5.8%**		**-4.4%**	

NOTES: Linage is given in paid ad pages. (X) represents number of times published each year; publications are mo unless otherwise specified. A. Sectional linage included prorated to circulation of regional editions. B. Incomplete repor included in group total and % change. C. Figures supplie Publishers Information Bureau. All other figures are supplied b magazines. *Ad Age* makes no attempt to verify figures and is responsible for inconsistencies or errors. Magazines failing to close linage 3 times are removed from listing. Compiled by K Welyki.

Boycott of Nike ignored

By Scott Hume

GALLUP SURVEY

Most consumers say they won't heed Operation PUSH's call to boycott Nike athletic products, a national survey conducted for *Advertising Age* showed.

Of the 1,050 adults surveyed last month by the Gallup Organization, 31% said they were aware of the boycott call. One-fifth said they plan to buy fewer Nike products than they did before; 64% said they will buy about the same amount.

But 39% agreed with the principle that a company that sells its products to minorities has an obligation to return some of its profits to minority communities.

PUSH, the Chicago-based activist group founded by the Rev. Jesse Jackson, in August criticized Nike for its failure to deposit money in black-owned banks, the absence of blacks on its board and the decision not to use a black-owned ad agency despite Nike's claim that up to one-third of its sales come from black consumers.

Wieden & Kennedy, Portland, Ore., is Nike's agency. Its ads have featured black athletes and filmmaker Spike Lee.

Nike responded that three-quarters of the $10 million it spent last year on philanthropic causes was directed to inner city neighborhoods. Further, it charged that PUSH had targeted Nike after rival Reebok International bought a page ad in *PUSH* magazine.

The organization said it gets no revenues from the magazine and, angered by Nike's request to audit PUSH's finances and membership lists, called for a Nike boycott.

Awareness of the dispute was notably higher among men (40% of whom said they had heard of the controversy) than among women (24%). Awareness also was higher among non-whites (37%) than among whites (30%).

Overall, 39% said they agreed with PUSH's claim that companies that sell to minorities have an obligation to invest profits in minority communities.

Women were more likely to agree (42%) with that statement than were men (35%), and two-thirds (65%) of non-white respondents agreed, compared with one-third (35%) of whites.

Nearly half (49%) the respondents ages 18 to 34 agreed, while 34% of those 35 to 54 and 30% of those 55 and older agreed.

The random telephone survey has a margin of error of plus or minus 3.1%. □

Social responsibility

Last month, 1,050 adults were asked "Does a company that sells its products to minorities have an obligation to return some of its profits to minority communities, or not?"

Source: Gallup Organization

JOHN HEILAND

Pepsi-Coke ad recall battle goes flat

By Kate Fitzgerald

Pepsi-Cola fizzled from first to 10th last month in advertising recall.

The soft-drink brand had been No. 1 in *Advertising Age's* monthly adWatch survey of advertising awareness for July and August.

The tumble came at the end of the aggressive summer cola marketing season and capped nine months of Pepsi and Coca-Cola dueling for the top spot in the survey.

Coca-Cola's awareness remained high (the No. 2 spot last month) while Pepsi's dipped, possibly because a new fall campaign for Diet Coke broke early last month and drove up overall brand awareness. That campaign, which broke Sept. 9, features National Football League players.

Pepsi-Cola execs had no comment on its decline in ad awareness.

McDonald's Corp. finished on top in the survey for the first time since February 1989. The fast-food chain's current "Food, folks and fun" campaign includes TV spots announcing McDonald's switch to vegetable oil frying for its french fries and commercials promoting a children's meal tie-in with Nintendo.

McDonald's "McMillions" promotion with NBC didn't start until after the September survey was completed.

Automobile advertising awareness remained high, climbing to third from eighth.

Nike fell two notches to fourth, due to its continuing offbeat TV campaign and back-to-school ad efforts.

Ford dropped a spot to fifth, and there was a three-way tie for sixth among Anheuser-Busch's Budweiser, Chevrolet and Toyota.

Miller Brewing Co.'s Miller and Miller Lite placed ninth, the brands' first appearance in the top 10 since June.

Purina Puppy Chow was back among the top five **pet food** advertisers in aided awareness, getting 2.7% of first mentions. Alpo led the category with a 12% share, followed by Ralston Purina Co.'s Purina with 10.7%; Carnation Co.'s Friskies with 4.7%; and Quaker Oats Co.'s Kibbles 'n Bits with 3.2%.

The Wine Group's Mogen David made a rare appearance in the **wine** category, finishing fifth with 1.1% of first mentions. Gallo led with 17%, followed by E&J Gallo Winery's Bartles & Jaymes with 10%; Banfi Vintners' Riunite with 3.6%; and Seagram's wine coolers with 2.6%.

Big O Tires finished fifth in the **tire** category with a 1.2% share, the company's first appearance in the category's top five in aided recall since October 1988. Goodyear led with 26.7%, followed by Michelin, 24.7%; Firestone, 5.9%; and BF Goodrich, 3.7%.

Adwatch is a joint project of *Ad Age* and the Gallup Organization. Advertising awareness is measured by asking a nationally projectable sample to name the first advertising that comes to mind from all seen, heard or read in the previous 30 days.

Last month, 1,000 adults were polled by phone. The survey's margin of error is plus or minus 3.1%. □

For more information, contact the Gallup Organization, 301 S. 68th St., Lincoln, Neb. 68506. Phone: (402) 489-0351.

AdWatch survey of advertising awareness
Top 10 for September

In September, 1,000 people were asked: Of all the advertising you have seen, heard or read in the past 30 days, which advertising first comes to mind?

Rank 9/90	Rank 8/90	Advertiser	Agency
1	9*	McDonald's	Leo Burnett USA
2	3	Coke/Coca-Cola	McCann-Erickson Worldwide/-Lintas:New York
3	8	Automobiles	Various
4	2	Nike	Wieden & Kennedy
5	4	Ford	J. Walter Thompson USA
6*	5*	Budweiser/Bud Light	D'Arcy Masius Benton & Bowles/-DDB Needham Worldwide
6*	5*	Chevrolet	Lintas:Campbell-Ewald
6*	9*	Toyota	Saatchi & Saatchi DFS/Pacific
9	—	Miller/Miller Lite	Backer Spielvogel Bates/-Leo Burnett USA
10	1	Pepsi	BBDO Worldwide

*Indicates tie. Source: Gallup Organization, Lincoln, Neb.

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